



## Project Snapshot: Veal Consumer Index

- Insights from Research to Enhance the Marketing of Veal



Date: December 14, 2009

### Background

The veal go-to-market strategy team wished to validate their strategic choices concerning the consumer target for their efforts, the channel of distribution on which to focus, and key messaging to prompt increased veal usage. The market research department was able to enhance an ongoing consumer survey of beef and chicken perceptions to include veal in July of 2009. Supplemental questions were added to the survey, which includes an extensive battery of questions on nutritional attitudes, and factors that are of critical importance in choosing a protein for dinner.

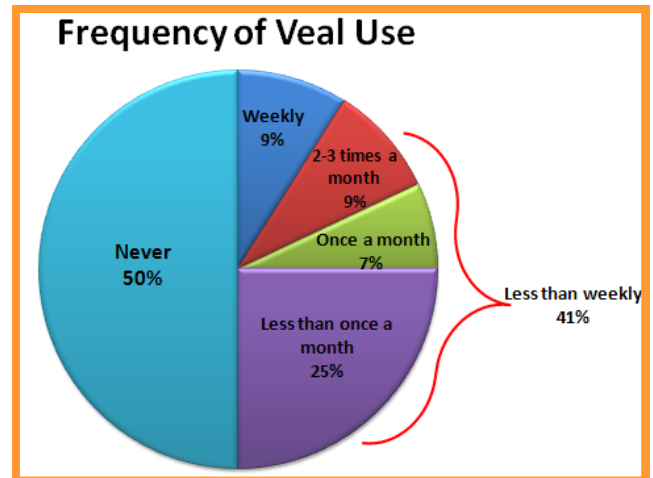
### Methodology

The “Consumer Veal Index” was conducted among 13-65 year-olds, excluding those who have no influence on the household’s grocery shopping, or selection of away-from home meals. The sample of 1,000 consumers was balanced for national norms on age, income, geographic distribution, and other key demographic factors.

### Major Insights

#1 – the Veal Industry Should Focus on the Light to Medium Veal User

Boosting usage among light to medium users of veal (consume less than one time per week) is clearly the superior strategy. There are currently over four light to medium users for every weekly veal user. And a clear strategy reveals itself – this group finds veal intimidating, and thus needs knowledge on how to purchase a veal cut and prepare a veal meal. Light to medium users share many veal attitudes with non-users, especially that veal is associated “with the good life,” is always tender and is worth paying more for.



#2 – Channel of Distribution

A lighter veal user tends to look for veal at a restaurant, while a heavier user is more likely to buy veal at a supermarket. Thus, experimentation with veal will most likely occur in the foodservice channel, while heavy users will drive volume in the retail sector.

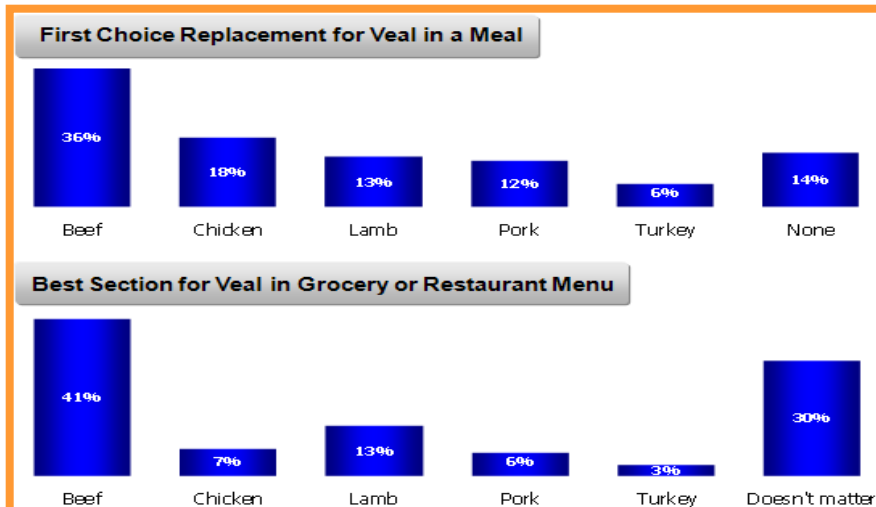
#3 – Do Not Target the Non-User

There are 2 factors working against promotion to non-users. First, non-users give low scores to veal on several critical dimensions, including taste and willingness to pay. Interestingly, they pay little attention to perceived veal issues such as animal welfare practices, but this is further evidence that veal is not on the radar with this group.

Interestingly, animal welfare is #7 in a list of barriers to non-users. 30% of non-users do not believe that veal comes from animals that are humanely raised. A much larger 52% don’t see veal as a food they crave, 36% disagree that it is great tasting, and 41% disagree that it is worth paying more for.



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#### #4 – Merchandise Veal Near Beef

When asked where veal should be merchandised, most saw close proximity to beef in the meat case as the appropriate location. And if veal was not available at a restaurant, by a two-to-one margin, beef was chosen as the alternative. Proximity to beef in the store or on the menu thus makes the most sense.

#### #5 – Veal Users are Protein and Life Savvy

Veal users eat a greater variety of meats and have a broader cooking skill set than non-users, as well as having higher incomes. In addition to loving the taste of veal, they choose it for a “change of pace” and for special dishes and occasions.

Those who consume veal monthly love to cook, are more likely to work out 2 or more times weekly, are very health conscious, and often advise others about purchases. Veal users outside of core heavy use areas in the Northeast are also likely to have children under the age of 18 in their households. In the core veal area, they are most likely older, and don’t have children under this age.

Due to all of these factors, veal consumers are a very influential group.

Veal User Profile Differences			
	Use Veal:		
	At Least Monthly	Less Than Monthly	Never
<b>Lifestyle Attitudes – Agree Strongly (8-10)</b>			
Cooking is a way to express creativity	45%	35%	36%
Often make changes to improve your lifestyle healthiness	42%	26%	29%
Pay attention to the nutritional value of foods	41%	25%	32%
Very health-conscious	38%	20%	26%
Often advise others about purchases	34%	16%	16%
<b>Lifestyle Behavior – Past Week</b>			
Cooked a meal on the BBQ	52%	40%	42%
Worked out 2 or more times/week	40%	31%	26%
Picked a meal and cooked it just for fun	39%	29%	28%
Dined at a formal restaurant	33%	19%	20%
<b>Base:</b>	<b>(255)</b>	<b>(251)</b>	<b>(503)</b>

#### Key Learnings

- To move volume, retail promotions are appropriate. To bring light to medium consumers further into the fold will require ongoing foodservice efforts.
- Veal promotion should center on the pleasure of veal (taste and tenderness), with supporting nutritional information.
- Although animal welfare concerns are not an over-powering issue for non-veal users, the other roadblocks to consumption in this group, including relatively little taste preference, makes the non-user an ineffective target for the veal industry. Light to medium users are a better target.